

Planner Roles Checklist

The following are all roles that a planner will need to take on during the course of an event. Use this as a checklist to see where you could further develop as an industry professional – as well as to identify which skills you already have:

Role	Strong	Needs Work
A timekeeper: creating a calendar, timelines, milestones, deadlines, minute-by-minutes and keeping the team on task.		
A financial manager: creating and managing budgets, developing accounting practices, monitoring profit and loss.		
A risk assessor: understand and mitigating personal, corporate, and financial risks.		
A legal executor: reviewing and signing contracts (either on your own or with a legal team).		
A chief negotiator: ensuring the terms of deals are appropriate, fair, and favorable to your organization wherever possible.		
A chief researcher: knowing what you need to know and where to find the information (permits, laws, maps, plans, schematics).		
A resource manager: ensuring the office, vendors, staff, time, equipment, supplies, and cash are all on hand as needed.		
A job site foreman: managing vendors, staff, being problem solver in real time on site.		
Lead evaluator: measuring the event against objectives and evaluating performance, reporting out to sponsors and key stakeholders.		
Lead psychologist: dealing with the motivations and emotions of individuals, managing the corporate culture, setting the tone for work-life balance.		
Help desk: the go-to person when things go wrong at any stage of the process.		
Administrative director: making sure the components get handled when they need to; the buck stops here.		
IT Director: ensuring there is WIFI, keeping track of passwords, helping speakers with their presentations, etc.		
Special skills (any of the following): graphic design, visual impact, environments, technology (registration, presentations), food and beverage (selection, menu design).		